

Seizing the Moments:

The Insider's Guide
to Perfecting the
Customer Journey



Introduction:

The customer journey is defined by moments, and brands are often defined by how they handle them. Yet a myriad of circumstances, expectations, and technologies undermine the ability for many organizations to seize those moments: the essential moments to delight, the golden moments to shine. But, what are the top inhibitors to delivering a wonderful customer journey, and more importantly, the secrets to perfecting it?

That's the quest the International Customer Management Institute (ICMI) set out to unearth. Surveying hundreds of contact center professionals at leading brands worldwide, ICMI discovered common practices as varied as 'blindfold driving' (over **20% of organizations having zero visibility** into customer data during interactions) to 'analysis without data' (**42% do not use contact center data** to conduct root cause analysis). The good news? ICMI has the recommendations to help overcome the challenges afflicting the contact center, as well as identify preventative measures for the future.

The findings in this whitepaper will help contact center decision makers:

1. **Overcome the Top Challenges in the Contact Center**
2. **Transform Reactive Customer Service to Proactive**
3. **Train Agents for the 'Moments' in the Customer Journey**
4. **Implement New Technologies with Existing IT Systems**
5. **Turn All Data Into Actionable Data**

This exploration of the customer journey begins with a simple fact: No Organization Is Perfect. In the midst of our own struggles, however, it may seem as though everyone else is getting things right. The truth of the matter is that even the contact centers that identify themselves as "best in class" have a few things that they wish they could change. From the best to the worst, we dissected the challenges, the strengths, and the opportunities that exist for any organization to perfect their customer's journey. It came down to five types of moments that happen every day:



Moments to Empower



Moments to Inspire



Moments to Excel



Moments to Enlighten



Moments to Delight

Your moments of fear, frustration, anger, or confusion can be no more.

We're giving you the keys to seizing the moments.



Moments to Empower

The customer journey has grown more complex, touching many different channels. However, when it comes down to it, the research findings suggest contact center leaders recognize that the agent may be the most crucial touch point for a customer in the entire journey – **96% identified the agent as having significant impact during the journey** (See Figure 1).

Yet despite the roundly recognized importance of the agent, one of the more worrying finds was that nearly **75% knowingly hinder** their team from providing the best customer experience (in some way). Only 26% are empowering their agents to deliver top-notch customer experience (See Figure 2). Such behavior has the potential to fuel agent disengagement and poor employee morale. In fact, the survey found that contact center leaders believe ‘people’ are the biggest challenge, explicitly citing **employee engagement and morale as the top challenge** in their organization (Figure 3).

Figure 1

What role does the contact center agent play in the customer journey?

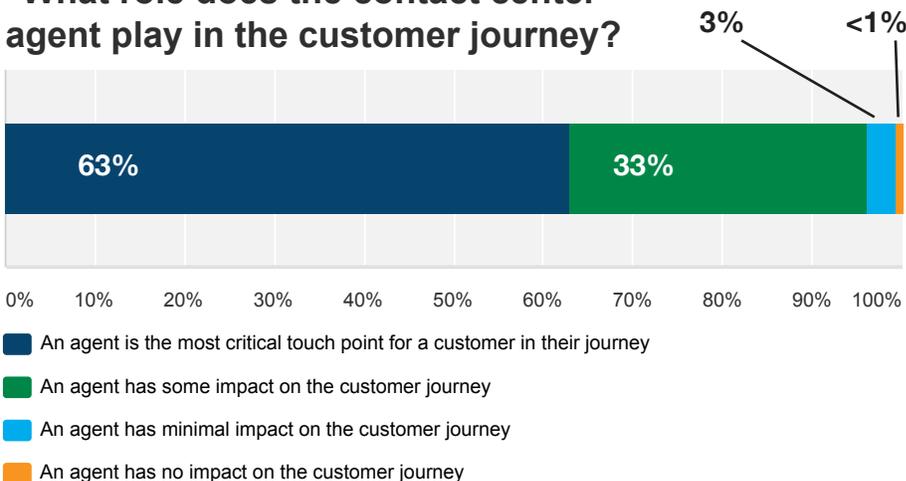


Figure 2

How empowered are your agents (or if you are an agent, how empowered are you) to make decisions necessary to provide the best customer experience?

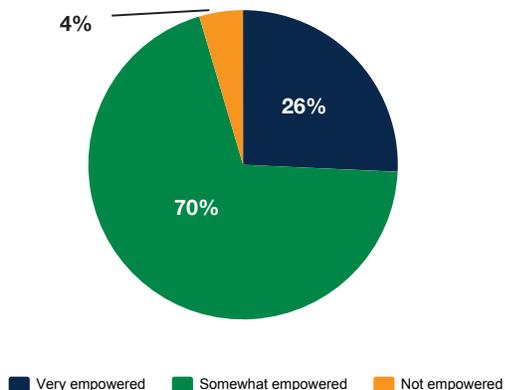
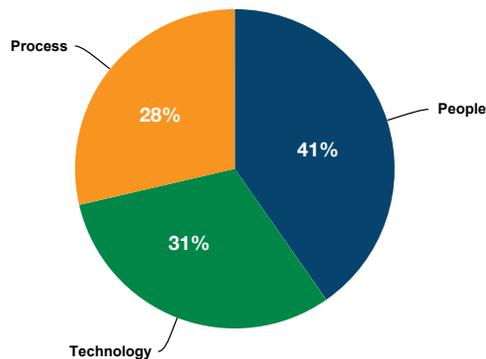


Figure 3

Between people, processes or technology which is the top challenge in your contact center today?



Own the Moments to Empower

ICMI's recent research revealed that the largest percentage of respondents who cited their top challenge as "people related" explicitly cited employee engagement and morale as the challenge.

Why does engagement and morale matter?

Organizations with engaged employees outperform those organizations with disengaged employees in categories like customer ratings, profitability, and productivity. In addition, they see lower turnover and absenteeism, as well as a reduction in quality defects.

What can you do to impact engagement?

- The things that organizational leaders say and do have an impact on the engagement level of their employees, regardless of whether or not that leader regularly interacts with the employees.
- When it comes to stress and work-life balance, the organization can affect an employee's level of engagement more than they may initially perceive. The contact center is a stressful environment. Provide training, tools and resources for coping with job-induced stress.
- Align business goals and objectives to individual employee contributions. The three steps to take to achieve such alignment begin with an explanation of the organization's goals and objectives. Next, explain the steps that the employee and the contact center need to take to reach the goals and objectives. And finally, affirm how their job contributes to and affects whether or not they achieve the organization's goals and objectives.
- Much of the day-to-day leadership on the floors of contact centers today is coming from the front line supervisors. These individuals are highly influential in the engagement of your contact centers staff and you can positively support them by doing two key things:
 - If you hired a supervisor because of the ability to build relationships, don't chain them to desks with extensive reporting duties.
 - Invest more time into coaching employees. Coaching is an opportunity to mentor, to engage, to perpetuate positive behaviors. Adopting a coaching culture in your organization is certain to have a lasting positive impact.



Moments to Inspire

Improving Employee/Agent Training ranked as one of the top things that contact centers wanted to overcome [Figure 4]. In fact, interaction with a customer service agent regarding product inquiry ranked as the most important interaction [Figure 5]. When done properly, training, coupled with meaningful coaching, is exactly what it takes to improve performance, drive customer satisfaction, enhance employee engagement, and drive revenue. Since time in training equals time away from working with customers, quantifying to what extent it fulfills contact center objectives is one of the primary reasons that training is under constant scrutiny.

Figure 4

Between people, processes or technology which is the top challenge in your contact center today?

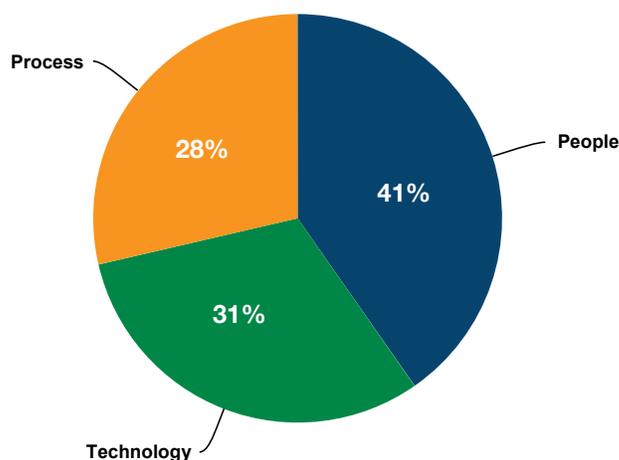
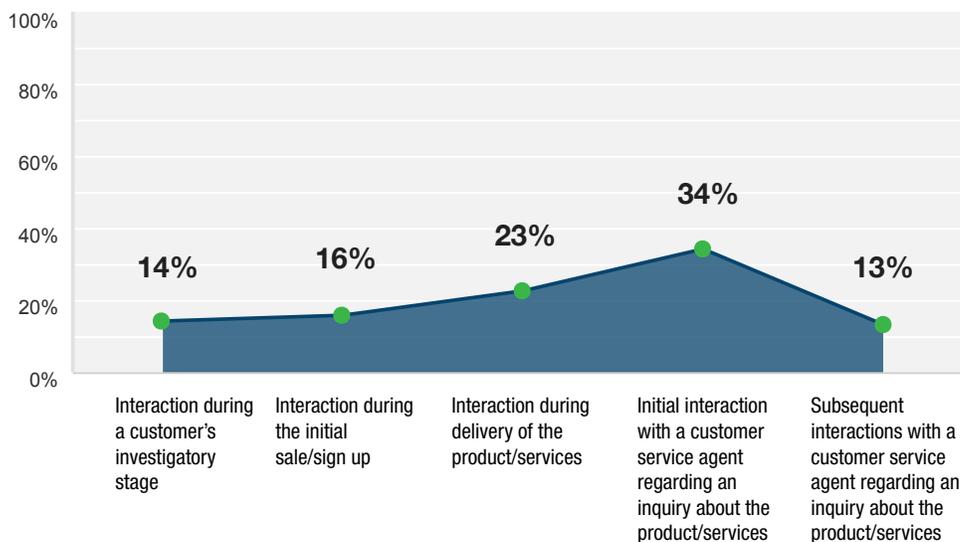


Figure 5

Which touch point in the customer journey do you feel has the greatest impact on customer experience?



Own the Moments to Inspire

The state of the agent seems to be less than optimal as a majority of contact centers do not empower their agents to their fullest potential and there are indicators that this is having an adverse effect on employee engagement, customer satisfaction, and overall contact center performance.

ICMI's research shows that agents are not happy when unable to help the customers and our research has repeatedly identified that **happy agents make happy customers** [Figure 6]. So then, why is it that an overwhelming majority of organizations would do something that is certain to make their employees unhappy?

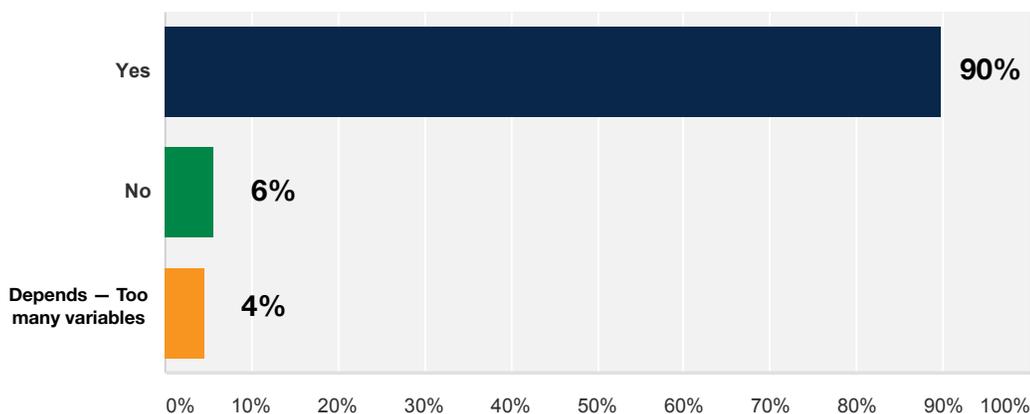
It would seem that one of the keys to increasing agent productivity and efficiency is to increase their level of empowerment.

Another step towards improving agent productivity and efficiency is by moving the highly replicable, transactional based interactions into self-service channels. By freeing agents to handle the contacts of greater complexity, they experience challenge and heightened value in the work that they're doing, which makes them less prone to boredom, feeling replaceable, or de-valued.

Lastly, view agent productivity and efficiency through realistic lenses. When it comes to the big picture, what do you really care about? The factors contributing to agent productivity and efficiency can range from contact center size, to volatility of contact types, to the measures used to define "productive or efficient". When establishing objectives, it's important to consider all of these factors in addition to customer expectations and an agent's tolerance.

Figure 6

Does your contact center believe that happy agents make happy customers?





Moments to Excel

Nearly all respondents (98%) agree that real-time information is vital (Figure 7). Yet, over **one-fifth of organizations have zero visibility** into basic information such as contact history when interacting with customers (Figure 8). How did contact centers get into this predicament?

Figure 7

How important is it to have real-time information about a customer when speaking with him or her about an issue?

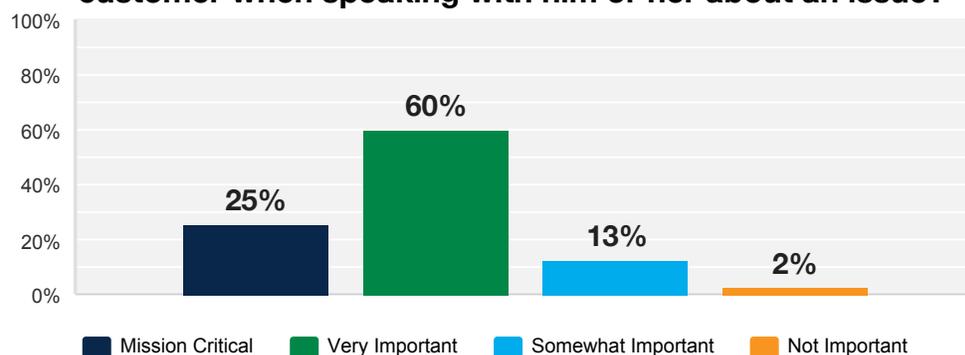
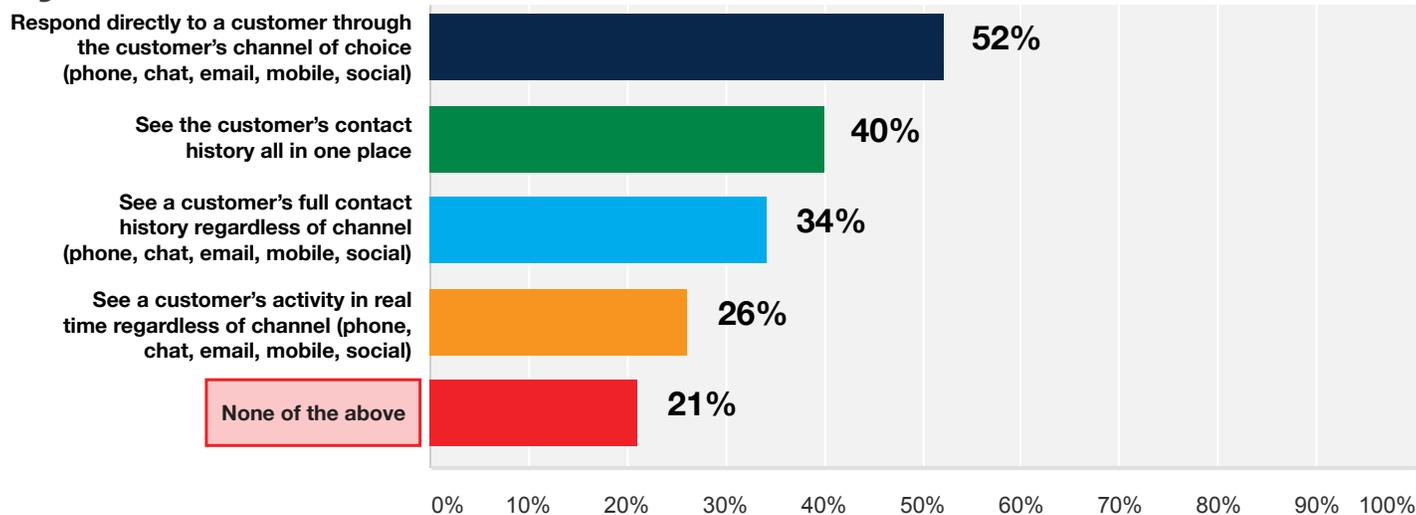


Figure 8

Does your current technology suite allow your agents to...



One explanation may be the proliferation of new channels in which agents must interact with customers today. While **inbound phone calls continue to reign supreme**, email, chat and social media (used by two-third of organizations surveyed) are all part of the increasing use of alternative channels leveraged by customers to communicate with brands (Figure 9). With many contact centers still using multiple, siloed applications, it is not hard to see why customer interactions may—at times—be just shy of delightful. Agents require the right tools—real-time screen pops, access to customer interaction history, single agent desktop—to be able to act quickly across different channels and address customer needs efficiently.

Figure 9

What percentage of volume does each channel currently represent? (Must equal 100)

Phone — Inbound	93%
Email	86%
Back Office (Fax and/or Mail)	71%
Phone — Outbound	67%
Chat	43%
Web	43%
Self-Service Phone IVR	40%
Mobile/Smartphone App	36%
Self-Service Portal/Knowledgebase	33%
Social Media	29%
Community Forum Moderation	26%
SMS	24%
Video	18%
Other	12%

Own the Moments to Excel

Our research uncovered a variety of factors that could contribute the limited insight into basic customer information, with a majority of people citing either no system or siloed systems. For this 20%+ with zero visibility, a new technology implementation or integration should be the next step. Recognizing that securing the capital expenditure, as well as implementing and integrating technology are top challenges for many organizations, we've compiled a few important tips for going about the process effectively.

Identify New Technologies:

Adding new systems, tools, or functionalities to the contact center can result in significant process improvements, time efficiencies, and improved experiences for customers and organizations alike. Three important “must-have” functionalities include the ability to support multichannel, a friendly agent desktop, and real-time reporting.

Securing Capital Expenditure for New Technologies:

The challenge lies not in our ability to acknowledge that benefits would exist, but rather our ability to demonstrate the financial benefits of the changes. Saying that something would improve the customer journey versus saying the actual financial value of improving the customer journey can yielded to very different results. Accomplishing the latter is what frequently overcomes the hurdles of resistance in securing CapX.

In order to do that, we've got to leverage data and analytics to support our story. What is the average lifetime value of our customers, what are the times and labor costs in supporting them today, and how would this technology present cost savings or revenue opportunities?

Integrating Existing IT Systems:

A majority of contact centers discover the need for integrating new and legacy systems and, if yours does, there are a few things to do to prevent such a task from falling within your top challenges. First and foremost: make sure your systems have APIs to integrate with one another. Then, when it comes time for the actual integration to occur, be certain that you're using good data. You'll need to clarify how information defined, remove or merge duplicate information, and eliminate as many typographical errors as possible. This step of the process is may be time-consuming and intensive, but is worth its weight in gold when successfully executed.

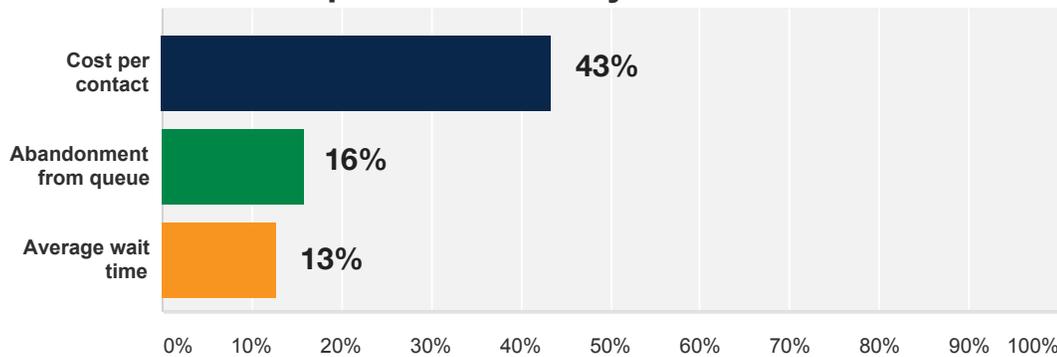


Moments to Enlighten

Consistently meeting KPIs/SLAs was a top challenge for many contact centers. Resolving this top challenge may be as simple as changing the very metrics that you’re measuring. For example, 28% of respondents cited an increase in Cost Per Contact as the best indicator of poor financial performance in the contact center (Figure 10), yet a rising cost per contact is a common outcome of increased self-service utilization. By moving the highly repetitive or transactional types of interactions into self-service channels, the contact center spends a larger percentage of time supporting the more complicated contact types. As a result, the cost of each contact handled by an agent will rise but the overall costs to the organization will be reduced as a result of the self-service efficiencies.

Figure 10

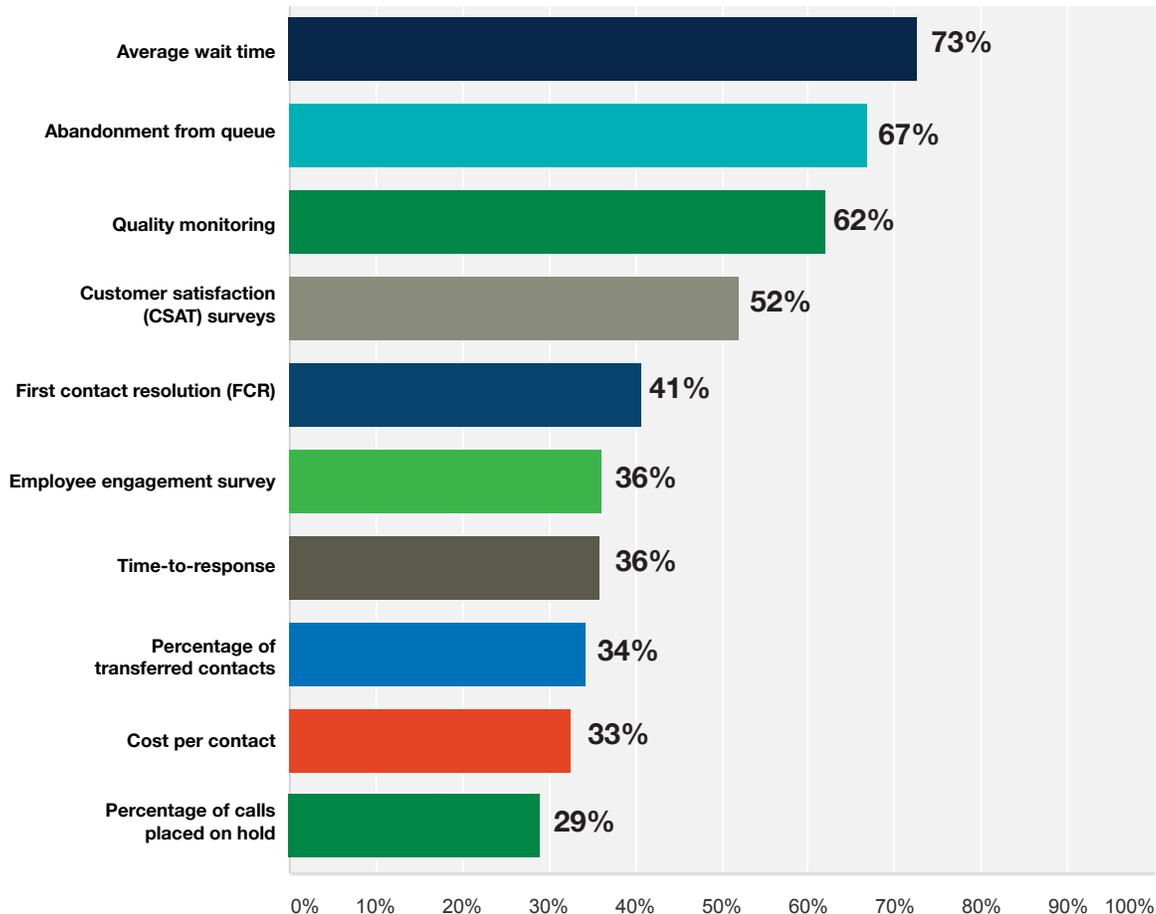
Which metric is the best indicator of poor financial performance in your contact center?



From ICMI’s research, it became evident that for many, “advanced” contact center metrics are in their infancy as most contact centers have yet to see the need to deviate from traditional stats to deliver on customer experience different from their competitors. The metric of greatest commonality among survey respondents was abandonment from queue (68%), yet this metric also topped the list of “least effective” metrics. This is a perfect example of how contact centers are evolving—or more directly how customers are interacting differently with contact centers and need to be measured differently to be truly effective. [Figure 11]

Figure 11

What customer experience metric(s) or initiative(s) does your contact center currently have in place? (Select all that apply.)



As the customer experience evolves into a complicated compilation of moments, an organization's ability to effectively measure and affect it requires a combination of scores and metrics. As was noted in our research, the customer experience can not be measure by one metric alone. Best in class organizations will focus their efforts on the metrics such as CSAT, NPS, and FCR. A critical first step in providing a successful customer experience is to determine whether or not your KPIs and SLAs meet two key criteria.

Own the Moments to Enlighten

We need KPIs and SLAs to do two important things for our contact centers:

1. Define and measure our progress toward our goals
2. Be quantifiable measure that reflect contact center success

To match your center's metrics to these needs, you should be asking yourself, "What are our goals, what does success look like, and what effectively measures our progress and success?"

The categories of metrics, business reasons, technology capabilities, and individual drivers will vary organization by organization, but all must start by aligning to their goals, defining success, and balancing needs. Then we must revisit them on a regular basis and assess whether or not they're serving their two primary purposes. Based on our research, the time has come for many centers to reassess their metrics and begin the transition from the old to the new.

★★★★★ Moments to Delight

One of the more compelling findings from ICMI research was in regard to customer engagement. **Nearly 80% of respondents felt that their customers are not extremely engaged with their company** (Figure 12). This is alarming, as these customers potentially view their relationship with the organization as disposable and could potentially defect at the next best opportunity.

Our research verified that if contact centers could identify a customer having an issue in real-time and make a proactive outreach it would greatly improve BOTH the one-time customer experience and the full customer journey [Figure 13].

- 56% of survey respondents said that it would greatly improve both the one-time customer experience and the full customer journey.
- 24% of respondents said that it would greatly improve just the one-time customer experience
- 15% of respondents said that it would greatly improve just the full customer journey

Figure 12

How engaged do you consider your customers to be with your company?

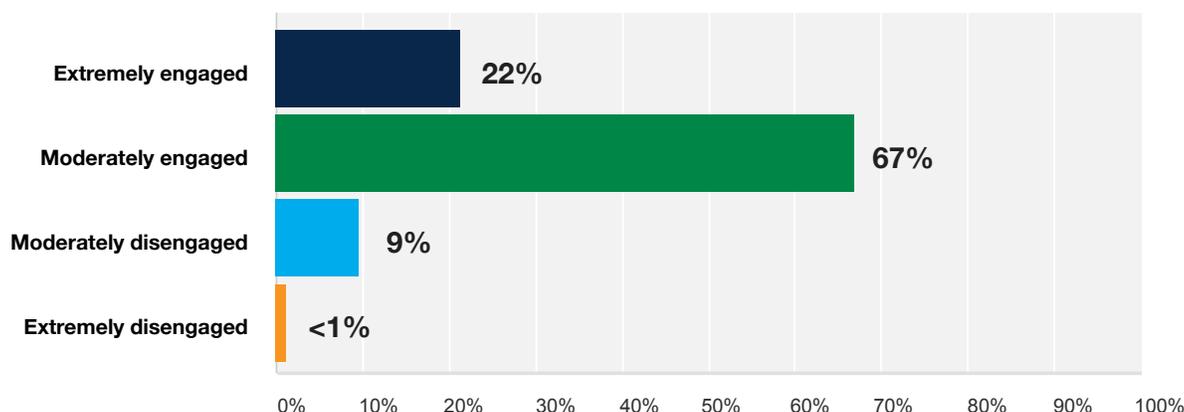


Figure 13

If you were able to identify a customer having an issue in real-time based on online activity and were able to reach out to that customer proactively, how do you see this impacting the customer experience/journey?



Own the Moments to Delight

While multiple factors are at play with customer engagement, just as with employee engagement and satisfaction, there are steps organizations can take to better satisfy and engage their customers.

ICMI's belief is that so many customers have low engagement because they view their interactions with organizations as necessary burdens and not conveniences or enhancements to their life. The challenge for organizations is overall is, how can we make the customer's life easier? How do we respect their time, resources, and preferences?

Don't ignore the rise of other channels and their importance. Social engagement, in particular, has risen in its usage by organizations for customer service, sales, and technical support. Many organizations also cite evolutions in self-service channels, as they look to reserve the contact center for the contacts of higher complexity and importance.

Implement technology that enables you to monitor situations and interactions in real-time, so you can anticipate your customer's next steps and contact them in their channel of choice to provide the type of service they want and need in the most important moment of their journey. Imagine the surprise, delight, and lasting positive impact that it would leave on the customer.

Investigate contact drivers! If you want your customers to be satisfied with you, you've got to understand their problems and be willing and able to do something about them. You would never think of driving a car blindfolded, yet an uncomfortable percentage of contact centers are essentially doing just that on a regular basis.

Lastly, have a Customer Satisfaction program in place. While our research did not uncover a singular "magic metric" for companies to best manage their business, customer satisfaction surveys were cited as the best metric for companies to manage their business (19%) and compare themselves to competitors (18%) **yet only 53% of survey respondents have a CSAT survey program in place**. CSAT seems to be the de-facto metric in the absence of true NPS/Word-of-mouth/loyalty/share of wallet.

Your Moment of Action

Organizations surveyed were split on how they use the data generated by the contact center. While many use it for things such as improving operational efficiency, experience consistency, and experience results, the majority are not using it for customer journey mapping, having a 360 degree view of customers, or informing marketing decisions.

In this age of information inundation, contact centers and their leaders must be able to cut through the noise to capture the most meaningful, most impactful insights and then be capable of acting on them in the moment. We're no longer in an age where weekly or even daily reports suffice in providing us with the information we need to truly provide the type of experience that meets customer expectations.

We need to be proactive. We need to leverage trends and customer behaviors to anticipate their next move and to intervene before they come to us for help. We need to own 'THE MOMENT' of truth, their interaction with the agent. When we do, there won't be any stopping us. Our customers will love us. Our agents will proud to be a part of us. The rest of the world will be talking about us.

Your moment of action is now.

About LiveOps

LiveOps is the global leader in cloud contact center and customer service solutions. More than 400 companies around the world, including ProFlowers, Ideal Living, Murad, Aegon, Salesforce.com, Symantec, Royal Mail Group and Amway New Zealand, trust LiveOps' technology to enable effective multichannel, social and mobile interactions with their customers. LiveOps' award-winning platform has processed more than 1 billion minutes of customer interactions and managed operations for the largest U.S.-based cloud contact center of 20,000 home-based, independent agents. With more than 13 years of cloud experience, LiveOps is the partner of choice for companies wanting to migrate to the cloud. Headquartered in Redwood City, California, LiveOps supports a wide range of industries, including financial, health care, insurance, retail and high tech. For more information visit <http://www.LiveOps.com>.

About ICMI

The International Customer Management Institute (ICMI) is the leading global provider of comprehensive resources for customer management professionals – from frontline agents to executives – who wish to improve customer experiences and increase efficiencies at every level of the contact center. Since 1985, ICMI has helped more than 50,000 organizations in 167 countries through training, events, consulting, and informational resources. ICMI's experienced and dedicated team of industry insiders, trainers, and consultants are committed to helping you raise the strategic value of your contact center, optimize your operations and improve your customer service. ICMI is a part of UBM plc (www.ubm.com), a global events-led marketing services and communications company.